Legacy Gift Formalization

Thank you for your promise to the Tidewater Jewish community to provide for future generations and assure continuity of services and programs by signing the Confirmation of Commitment. We are asking for you to confirm the formalization of your legacy gift.

I/We ______________________________, of __________________________, ____________,
confirm that I/we have provided for my/our promise to make a legacy gift for the benefit of the following organization(s):

________________________________________________________________________________________________________
________________________________________________________________________________________________________
________________________________________________________________________________________________________

The approximate value of my/our promise will be $_____________________ or __________% of my/our estate.

☐ Bequest in Will or Trust
☐ Beneficiary of Retirement Plan Assets (IRA, 401k, etc.)
☐ Beneficiary of Life Insurance Policy
☐ Other (please describe) __________________________

* Please provide a copy of the pertinent pages to make sure that your wishes are met.

_________________________________________
DONOR SIGNATURE

_________________________________________
DONOR SIGNATURE

DATE

OPTIONAL:

My/Our estate planning attorney:_________________________________________ Phone/Email:_________________________

My/Our financial planner:______________________________________________ Phone/Email:_________________________

Other (family member, executor, trustee):_______________________________ Phone/Email:_________________________

☐ TIF creates fund agreements to document your wishes. Please check here if you do not want to create a formal fund document in your name. Your gift will be directed to the unrestricted fund(s) of, or use by, the agency(ies) of your choice.

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• Beth Sholom Village
• Chabad of Tidewater
• Congregation Beth El
• Jewish Family Service of Tidewater
• Ohef Sholom Temple
• Simon Family JCC
• Strelitz International Academy
• Temple Emanuel
• United Jewish Federation of Tidewater

Please return this form to:
Tidewater Jewish Foundation
5000 Corporate Woods Drive, Suite 200
Virginia Beach, VA 23462

Contact or more information: foundation.jewishva.org | tjfinfo@ujft.org | 757-965-6111